

Amending a Requisition (Funds Increases on Requisitions prior to Award)

Under BPD procedures, if an Award is going to exceed the Requisition amount by more than \$1,000, a Funds Increase is required. This can be done by amending the Requisition, changing the line item(s) to the new amount(s), and then routing the amendment back to the requesting office for reviews/approvals. If funds need to be increased after an award has been made (i.e. by modifying the PO, DO, or Contract), a Req For Mod needs to be initiated (see Req For Mod instructions).

1.

The screenshot shows the VFO EZ REQ interface. On the left is a navigation menu with 'Main' highlighted. The top navigation bar contains buttons: Route, Suspend Line Items, View Form, Amend, Closeout, Cancel, Convert To Full, and a help icon. The 'Amend' button is highlighted with an arrow pointing to a callout box that says 'Click "Amend"'. The main content area is divided into two sections: 'EZ REQ Information' and 'General Information'. The 'EZ REQ Information' section displays: Requisition Number: AMENDED-PR-FOR-FI, Status: Released, Number of Items: 1, Version: BASE, Stage: Released Requisition, Total Amount: \$1,000.00, and Commitment: \$1,000.00. The 'General Information' section displays: Requisition Date: 09/06/2002, Requisitioner: THOMAS NORTHRUP, Site: BPD, Buyer: THOMAS NORTHRUP, Buyer Assign Date: 09/06/2002, Owner: THOMAS NORTHRUP, Primary Product / Service: PRPURCHASE REQUEST, Payment Office Code: ARC/ASD/ASB, Name: ARC/ASD/ASB, Address: 200 3RD STREET, UNB - 8TH FLOOR.

EZ REQ

Main

Items

Vendors

Supporting Docs

Form Info

Validations

Route History

Status History

Notifications

Ownership

Navigator

Return to Home

Route Suspend Line Items View Form **Amend** Closeout Cancel Convert To Full ?

EZ REQ Information

Requisition Number: AMENDED-PR-FOR-FI Status: Released Number of Items: 1
Version: BASE Stage: Released Requisition Total Amount: \$1,000.00
Commitment: \$1,000.00

General Information

Requisition Date: 09/06/2002
Requisitioner: THOMAS NORTHRUP
Site: BPD
Buyer: THOMAS NORTHRUP
Buyer Assign Date: 09/06/2002
Owner: THOMAS NORTHRUP
Primary Product / Service: PRPURCHASE REQUEST

Payment Office Code: ARC/ASD/ASB
Name: ARC/ASD/ASB
Address: 200 3RD STREET
UNB - 8TH FLOOR

Click "Amend"

2.

The screenshot shows a dialog box titled 'Version'. It contains the text: 'To create an amendment, the EZ REQ must be converted from an EZ REQ to a full Requisition. Are you sure you want to convert to a full Requisition?'. At the bottom are 'Yes' and 'No' buttons. An arrow points from a callout box saying 'Click "Yes"' to the 'Yes' button.

Version

To create an amendment, the EZ REQ must be converted from an EZ REQ to a full Requisition.

Are you sure you want to convert to a full Requisition?

Yes No

Click "Yes"

3.

The screenshot shows a dialog box titled 'Create Amendment'. It contains the text: 'Amendment Number: 000001'. Below this are 'Create' and 'Cancel' buttons. An arrow points from a callout box saying 'Choose "Create"' to the 'Create' button.

Create Amendment

Amendment Number: 000001

Create Cancel

Choose "Create"

4.

Requisition

Main

General

Additional Info

Project

Text

Defaults

Summary

Items

Vendors

Supporting Docs

Form Info

Validations

Route History

Status History

Notifications

Ownership

Navigator

Return to Home

Route Self Approve Release View Form Amend Delete Net View Off Load PPT Renumber ?

Requisition Information

Number: AMENDED-PR-FOR-FI Stage: Amended Requisition Number of Items: 1

Version: 000001-In Progress Net View: On Total Amount: \$1,000.00

Commitment: \$1,000.00

General Information

Requisition Date: 09/06/2002

Requisitioner: TNORTHRU

Buyer: TNORTHRU

Originating Office: Edit

Primary Product/Service Code: PR

Received Date:

1. Note how the look-up buttons are present and we can now amend the PR.

2. Click "Items"

5.

Requisition

Main

Items

Vendors

Supporting Docs

Form Info

Validations

Route History

Status History

Menu

Notifications

Ownership

Navigator

Return to Home

Add Edit Delete Copy Renumber Change Status View Form Net View Off ?

Requisition Information

Requisition Number: AMENDED-PR-FOR-FI Status: In Progress Number of Items: 1

Version: 000001 Stage: Amended Requisition Total Amount: \$1,000.00

Commitment: \$1,000.00

Items

Select	Item Number	Description	Option Item	Status	Quantity	Amount
<input type="checkbox"/>	0001	Item to be increased by \$1000 or more		Item Active	1	\$1,000.00

Choose the item that will be increased.

6.

The screenshot shows the VFO Requisition system interface. On the left is a sidebar with a 'Requisition' header and a list of tabs: 'General' (highlighted with a red box), 'Additional Info', 'Ship To', 'Text', 'Summary', and 'Return'. The main content area has a top navigation bar with buttons: 'First', 'Previous', 'Next', 'Last', 'Add', 'Copy', 'Modify', and '?'. The 'Modify' button is highlighted with a red box and an arrow pointing to it from a text box on the right that says 'Select "Modify"'. Below the navigation bar is the 'Item Information' section, which displays 'Requisition Number: AMENDED-PR-FOR-FI', 'Item Number 0001', 'of 1', and 'Not on current amendment.'. Below this is the 'Item General' section, which contains the following fields: 'Item Number: 1', 'Description: Item to be increased by \$1000 or more', 'Quantity: 1', 'Unit of Issue: EA', 'Unit Price: \$1,000.00', 'Amount: \$1,000.00', and 'User Product / Service Code: (None)'.

7.

The screenshot shows the VFO Requisition system interface. On the left is a sidebar with a 'Requisition' header and a list of tabs: 'General' (highlighted with a red box), 'Additional Info', 'Ship To', 'Text', 'Summary', and 'Return'. The main content area has a top navigation bar with buttons: 'First', 'Previous', 'Next', 'Last', 'Add', 'Copy', 'Delete', and '?'. The 'Delete' button is highlighted with a red box. Below the navigation bar is the 'Item Information' section, which displays 'Requisition Number: AMENDED-PR-FOR-FI', 'Item Number 0001', 'of 1', and 'Not on current amendment.'. Below this is the 'Item General' section, which contains the following fields: 'Item Number: 1', 'Description: Item to be increased by \$1000 or more', 'Qualifier: By Quantity', 'Unit of Issue: EA', 'Quantity: 1', 'Unit Price: 1000.00000', 'Amount: 1000.00', 'User Product Code: ', and 'Calculate By Percent: ☒'. A text box on the right says '1. Note how the look-up buttons are present and we can now modify the LI.' with an arrow pointing to the 'Unit of Issue' field. Another text box on the right says '2. The current unit price is \$1000.' with an arrow pointing to the 'Unit Price' field.

8.

Requisition

General

Additional Info

Ship To

Text

Summary

Return

Item Information

Requisition Number: AMENDED-PR-FOR-FI Item Number 0001 of 1

Item General

Item Number: 1

Description: Item to be increased by \$1000

Qualifier: By Quantity

Unit of Issue: EA

Quantity: 1

Unit Price: 2000.00000

Amount: 2000.00

User Product Code:

Calculate By Percent: ☒

1. We must increase it to the **NEW TOTAL**, and **NOT** just by how much it is going up in price. Therefore, the new unit price is \$2000, this does not mean the unit increased by \$2000, it means the new price of the item is \$2000.

3. IF THE QUANTITY HAS TO BE AMENDED, IT MUST BE CHANGED ON THE SHIPPING ADDRESS AS WELL.

2. Print screens 9-12 are merely to illustrate the dollar change throughout the PR, you do not need to take these steps on an actual funds increase for a released Req (**UNLESS YOU ARE CHANGING THE QUANTITY**). If you would like to see the process then click on "Ship To", otherwise go to #13.

9.

Requisition

General

Additional Info

Ship To

Text

Summary

Return

Item Information

Requisition Number: AMENDED-PR-FOR-FI Item Number 0001 of 1

Ship To/Accounting

Select	Ship To	Mark For	Quantity	Amount	Deliver By
	<u>PUBLIC DEBT - PKB</u>		1	\$2,000.00	30 Days After Award

1. Note the amount took hold automatically.

2. Click on the hyperlink of the shipping address.

10.

Requisition Information

Requisition Number: AMENDED-PR-FOR-FI Description: Item to be increased by \$1000 Quantity: 1
Version: 000001 Unit Price: \$2,000
Amount: \$2,000

Delivery Location/Accounting Detail

Ship To

Ship To: PUBLIC DEBT - PKB Mark For:

Quantity: Amount: 1. The new amount is present.

Delivery Date: OR Days After Award:

Accounting

Select	Accounting Code	Measury Symbol	Fiscal Year	USSGL	Cost Code	Object Class	Reporting Category
<input checked="" type="radio"/>	(None)	BPD0560SE03XX	2003	610001	BPD2100000	2611	00000000

2. Choose "Edit"

3. THIS IS WHERE THE QUANTITY WOULD HAVE TO BE AMENDED. IN ADDITION YOU WOULD NEED TO GO INTO THE ACCOUNTING DATA AND CHOOSE CALCULATE TO GET THIS TO TAKE EFFECT.

11.

Requisition Information		
Requisition Number:	AMENDED-PR-FOR-FI	Ship To Code: PUBLIC DEBT - PKB
Version:	000001	Quantity: 1
		Amount: \$2,000.00

Accounting Information Detail		
USSGL	610001	OPERATING EXPENSE
Cost Code	BPD2100000	OFFICE OF THE ASSIS
Object Class	2611	GENERAL SUPPLIES
Reporting Category	00000000	
CAT_B_APPR	XXX	DEFAULT
Cohort	XX	DEFAULT
Project	XXXXXXXXXX	FUTURE USE
Future 1	XXXXXXXXXX	FUTURE USE
Future 2	XXXXXXXXXX	FUTURE USE
Percent:	100	
Quantity:	1	
Amount:	2000.00	
Committed Amount:	1000.00	Unobligated: 2000.00
Subject to Availability of funds:	<input type="checkbox"/>	

1. The amount flowed over into the accounting data as well.

2. Choose "Submit"

Calculate Submit Cancel

12.

Requisition Information
Requisition Number: AMENDED-PR-FOR-FI Description: Item to be increased by \$1000 Quantity: 1
Version: 000001 Unit Price: \$2,000
Amount: \$2,000

Delivery Location/Accounting Detail
Ship To
Ship To: PUBLIC DEBT - PKB Mark For:
Quantity: 1 Amount: 2000.00
Delivery Date: OR Days After Award: 30

Accounting Add Edit Delete

Select	Accounting Code	Treasury Symbol	Fiscal Year	USSGL	Cost Code	Object Class	Reporting Category
<input checked="" type="radio"/>	(None)	BPD0560SE03XX	2003	610001	BPD2100000	2611	00000000

"Submit"

13.

Requisition
General
Additional Info
Ship To
Text
Summary
Return

First Previous Next Last Add Copy Delete ?

Item Information
Requisition Number: AMENDED-PR-FOR-FI Item Number 0001 of 1

Add Edit Delete

Ship To/Accounting

Select	Ship To	Mark For	Quantity	Amount	Deliver By
<input checked="" type="checkbox"/>	PUBLIC DEBT - PKB		1	\$2,000.00	30 Days After Award

Click
"Return"

14.

Requisition Information

Requisition Number: AMENDED-PR-FOR-FI Status: In Progress Number of Items: 1
 Version: 000001 Stage: Amended Requisition Total Amount: \$2,000.00
 Net View: On Commitment: \$2,000.00

Select	Item Number	Description	Option Item	Status	Quantity	Amount
<input type="checkbox"/>	0001	Item to be increased by \$1000 or more		Item Active	1	\$2,000.00

1. Note the new commitment amount.

2. Click on "Route History"

15.

Requisition Information

Requisition Number: AMENDED-PR-FOR-FI Status: In Progress Number of Items: 1
 Version: 000001 Stage: Amended Requisition Total Amount: \$2,000.00
 Net View: On Commitment: \$2,000.00

To	In Date	Out Date	Comments	Status	Version	Phone	Site
Financial Interface		09/06/02 02:29 PM	N	Approved	BASE		COTS
THOMAS NORTHRUP		09/06/02 02:28 PM	N	Approved	BASE		BPD
THOMAS NORTHRUP		09/06/02 02:28 PM	Y	Originator	BASE		BPD

Select "Route"

16.

Create Route List

☒ New List
☐ Previous Route List

1. Select "NEW LIST".

Submit Cancel

"Submit"

17.

The screenshot shows a software interface with a top navigation bar containing buttons: 'Add Approver', 'Add Reviewer', and a help icon '?'. A callout box with an arrow pointing to the 'Add Reviewer' button contains the text: 'Select "Add Reviewer" to send this back to the end user/PR Creator.'

Below the navigation bar is a section titled 'Requisition Information' with the following details:

Requisition Number: AMENDED-PR-FOR-FI	Status: In Progress	Number of Items: 1
Version: 000001	Stage: Amended Requisition	Total Amount: \$2,000.00
	Not View: On	Commitment: \$2,000.00

Below this is a section titled 'Route' with a table header:

Select	Sequence	To	Site	Action	Type	In Date	Out Date
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At the bottom of the 'Route' section is a 'Cancel' button.

18.

The screenshot shows a search interface titled 'Add User to Route'. It includes a search bar with 'User ID' selected and 'For: bf' entered. There are 'Display' and 'Cancel' buttons. Below the search bar are options: 'Current Site' (selected), 'Max Results: 100', and 'Results per Page: 10'.

The search results are displayed in a table:

User ID	First Name	Middle Initial	Last Name	Site
<u>BFEIRTAG</u>	BRUCE		FEIRTAG	BPD
<u>BFERRELL</u>	BRIAN		FERRELL	BPD

Below the table is 'Page 1 of 1'. A callout box with an arrow pointing to the 'BFEIRTAG' user ID contains the text: 'Select the reviewer's UserID after you have searched for it.'

19.

The screenshot shows the same software interface as in step 17, but with additional buttons in the top navigation bar: 'Add Approver', 'Add Reviewer', 'Move Up', 'Move Down', 'Delete', and a help icon '?'. The 'Route' table now contains one entry:

Select	Sequence	To	Site	Action	Type	In Date	Out Date
	1	BRUCE FEIRTAG	BPD	Ready to send	Review		

Below the table are buttons for 'Send', 'Save', and 'Cancel'. A callout box with an arrow pointing to the 'Send' button contains the text: 'Click "Send".'

20.

Requisition Information

Requisition Number: AMENDED-PR-FOR-FI Status: In Progress Number of Items: 1
 Version: 000001 Stage: Amended Requisition Total Amount: \$2,000.00
 Net View: On Commitment: \$2,000.00

Originator Comments

Optional comments (up to 2000 characters): Here is the funds increase we discussed.

Add Comments Skip Comments

“Add” or “Skip Comments” as you see fit.

21.

VFO

Change Route Release View Form ?

Requisition

Main
 Items
 Vendors
 Supporting Docs
 Form Info
 Validations
Route History
 Status History
 Notifications
 Ownership
 Navigator
 Return to Home

Requisition Information

Requisition Number: AMENDED-PR-FOR-FI Status: In Progress Number of Items: 1
 Version: 000001 Stage: Amended Requisition Total Amount: \$2,000.00
 Net View: On Commitment: \$2,000.00

Route History

To	In Date	Out Date	Comments	Status	Version	Phone	Site
BRUCE FEIRTAG	09/06/02 03:03 PM		N	Sent	000001		BPD
THOMAS NORTHRUP		09/06/02 03:03 PM	Y	Originator	000001		BPD
Financial Interface		09/06/02 02:29 PM	N	Approved	BASE		COTS
THOMAS NORTHRUP		09/06/02 02:28 PM	N	Approved	BASE		BPD
THOMAS NORTHRUP		09/06/02 02:28 PM	Y	Originator	BASE		BPD

Once you see “Sent” next to their name you know it is in their in-box. If it still says “Ready to Send” it has not gone across and you will need to delete their name, add it again, and then send it once more.